

SiteManager **Training Manual**



Module A
Chapter 3

Contract Administration (+)
Contract Records
Correspondence Log


Section A-2-11-1
Attaching a Document

Student's Version

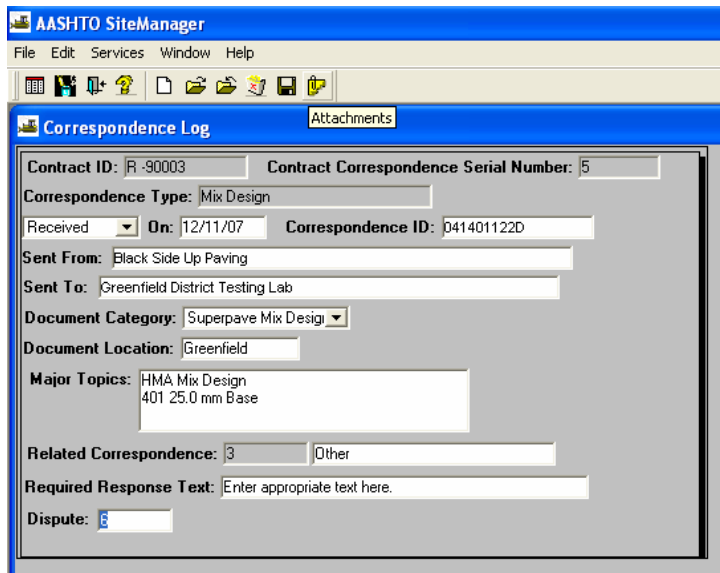
Indiana Department of Transportation
December 2007 Version 3.7b

This page intentionally left blank

Attaching a document in SiteManager

This module will explain how to attach a document within SiteManager. Any window can have a document attached that has the Attachment  icon located on the toolbar.

NOTE: Do NOT attach jpeg or jpg files into SiteManager. These types of files currently cannot be viewed in SiteManager. File types that work include xls (Excel), doc (MS Word), pdf, bitmaps. Make sure to lock the xls, doc and pdf documents with a password, else users who have update rights to this window will be able to modify the document.



AASHTO SiteManager

File Edit Services Window Help

Correspondence Log Attachments

Contract ID: R-90003 Contract Correspondence Serial Number: 5

Correspondence Type: Mix Design

Received On: 12/11/07 Correspondence ID: 041401122D

Sent From: Black Side Up Paving

Sent To: Greenfield District Testing Lab

Document Category: Superpave Mix Design

Document Location: Greenfield

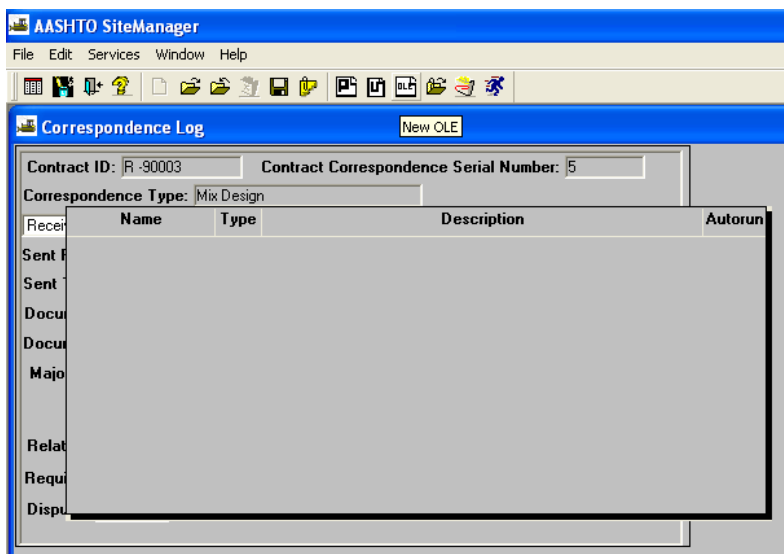
Major Topics: HMA Mix Design
401 25.0 mm Base

Related Correspondence: 3 Other

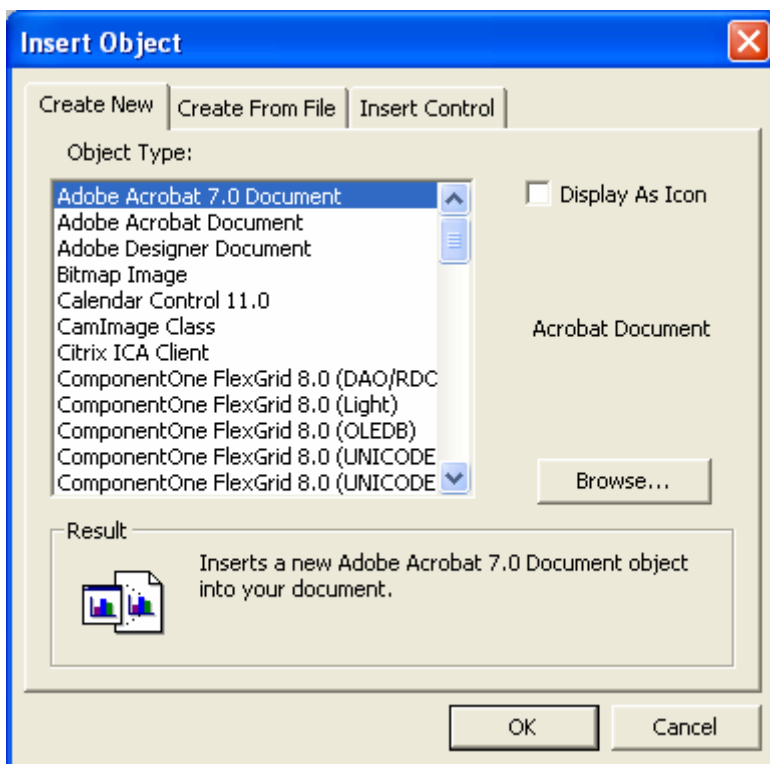
Required Response Text: Enter appropriate text here.

Dispute: 6

“Click” on the **Attachments** button  located on the toolbar.



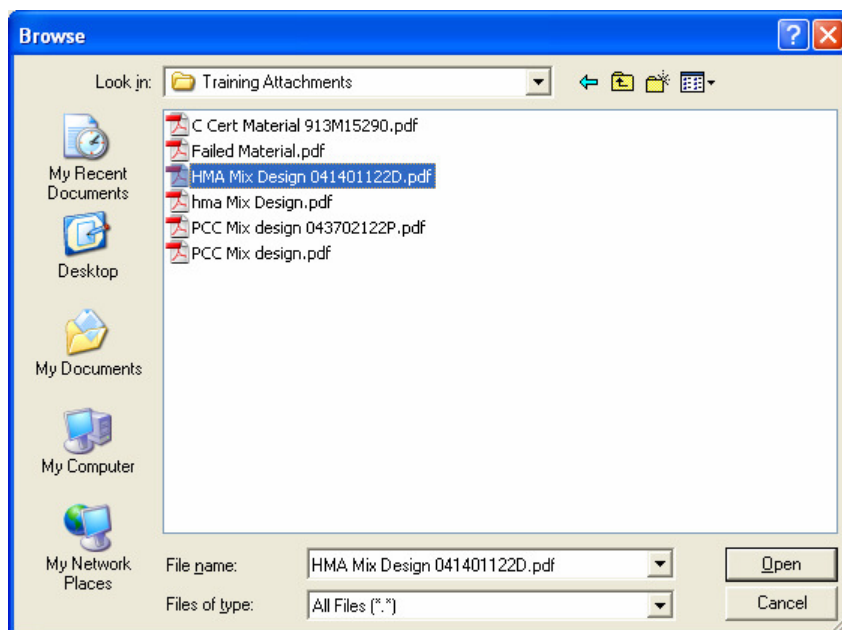
“Click” on the **New OLE**  button located on the toolbar.



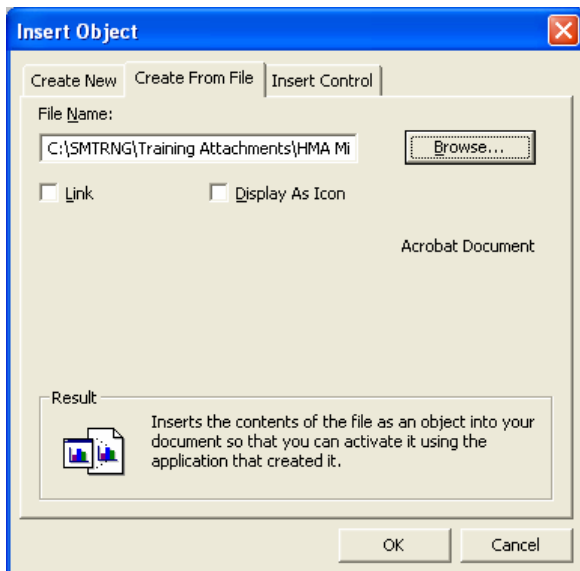
“Click” on the **Create From File** tab.



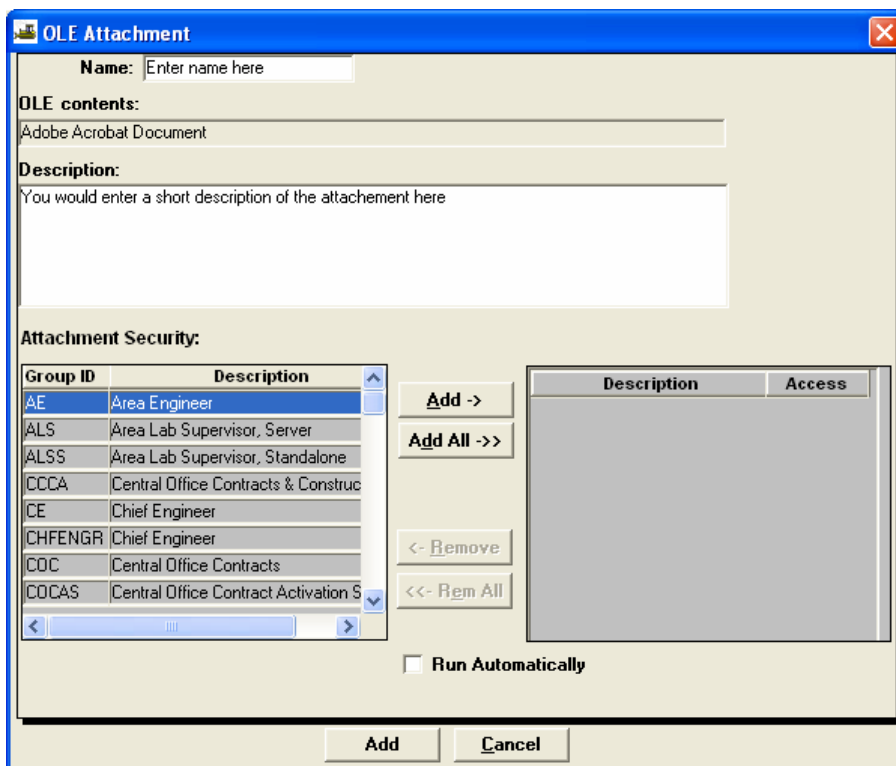
“Click” on the **Browse** button.



Locate and “click” on the appropriate file name. “Click” on the **Open** button.

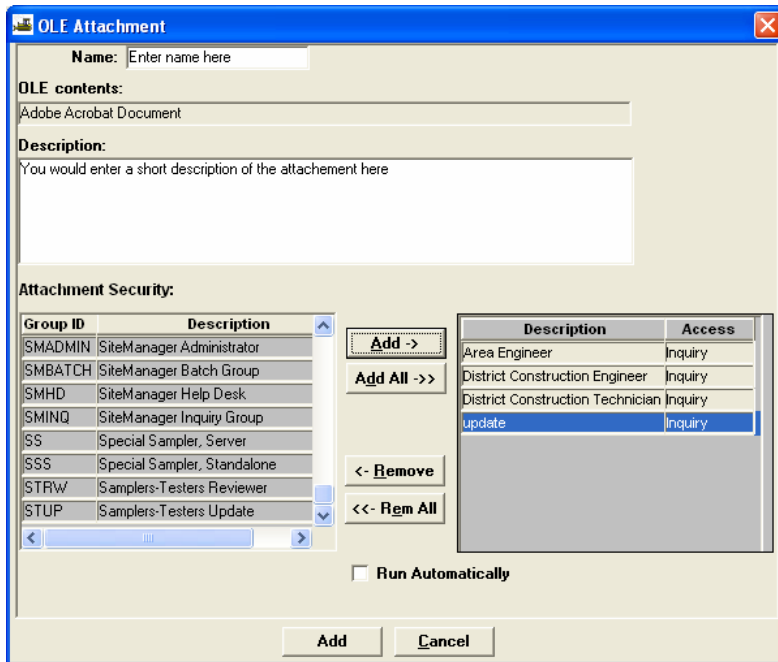


“Click” on the **OK** button.



Name: “Enter” a name for the attachment in the **Name** field.

Description: “Enter” a description of the attachment in the **Description** field.



OLE Attachment

Name:

OLE contents:

Description:

Attachment Security:

Group ID	Description
SMADMIN	SiteManager Administrator
SMBATCH	SiteManager Batch Group
SMHD	SiteManager Help Desk
SMINQ	SiteManager Inquiry Group
SS	Special Sampler, Server
SSS	Special Sampler, Standalone
STRW	Samplers-Testers Reviewer
STUP	Samplers-Testers Update

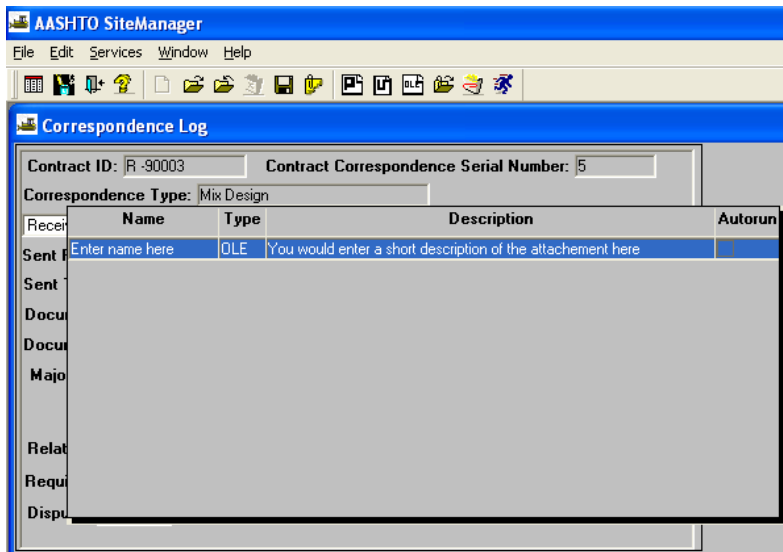
Add **Add All ->>** **<- Remove** **<<- Rem All**

☐ Run Automatically

Add **Cancel**

NOTE: Remember to give your user group right to the document. Otherwise you will not be able to view the attachment.

“Click” the appropriate reviewer from the **Group ID** or **Description** list, located in the right **Attachment Security** panel. These will be the User Groups that will have access to view this attachment. “Click” the **Add** button located between the two panels in the Attachment Security area. More than one reviewer may be added to the right panel. Next “click” the **Add** button located at the bottom of the panel.



AASHTO SiteManager

File Edit Services Window Help

Correspondence Log

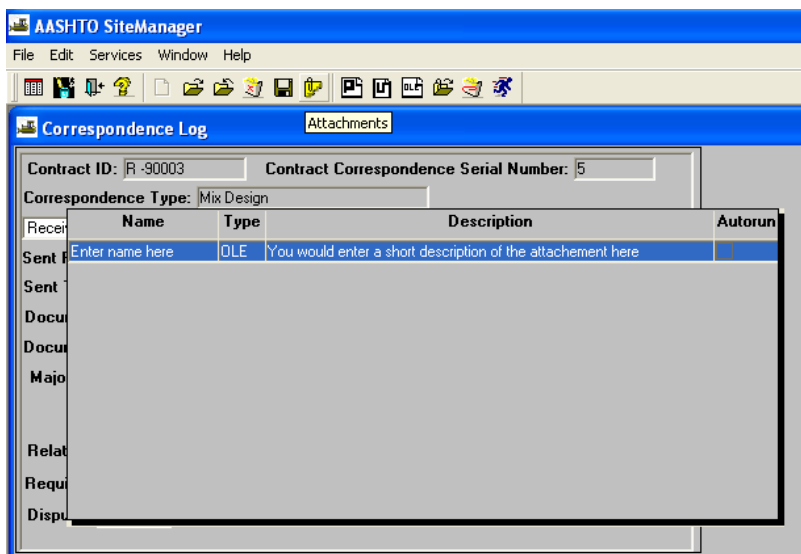
Contract ID: Contract Correspondence Serial Number:


Correspondence Type:

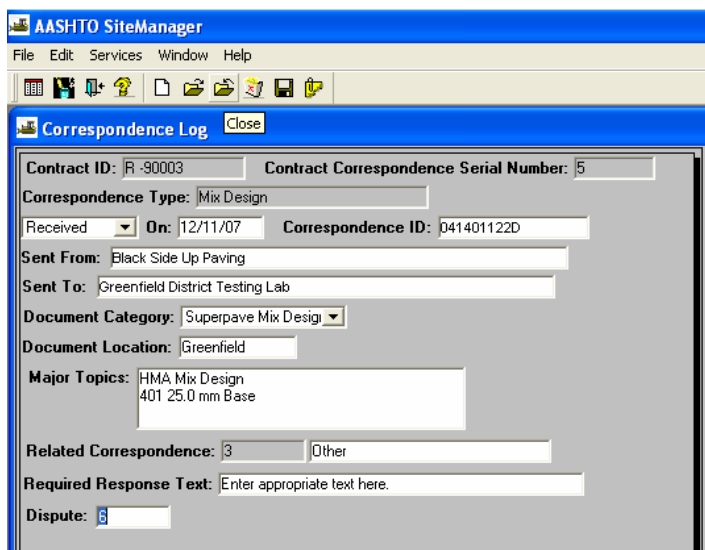
Received	Name	Type	Description	Author
Sent	<input type="text" value="Enter name here"/>	OLE	<input type="text" value="You would enter a short description of the attachment here"/>	
Sent				
Docu				
Docu				
Majo				
Relat				
Requi				
Dispu				


Notice that the attachment is added to the **Correspondence Log**.

“Click” on the **Save**  button located on the toolbar.




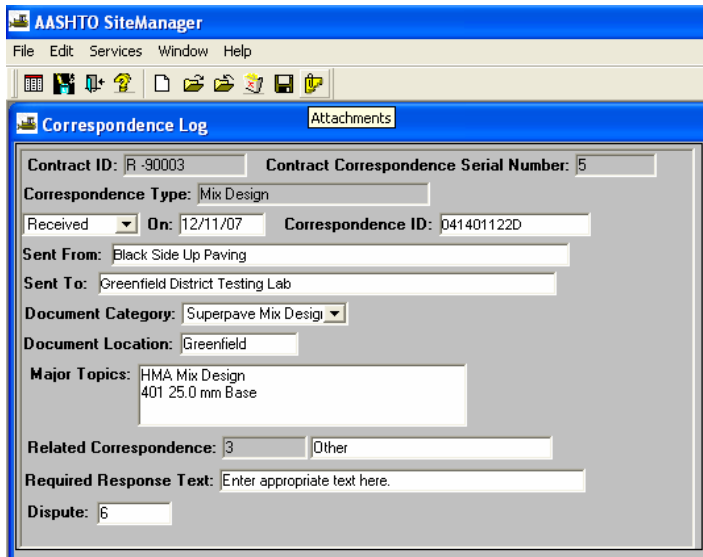
“Click” the **Attachments**  button located on the toolbar to close the attachments window.



“Click” on the **Close**  button located on the toolbar to exit the **Correspondence Log** window.

Viewing Attachments

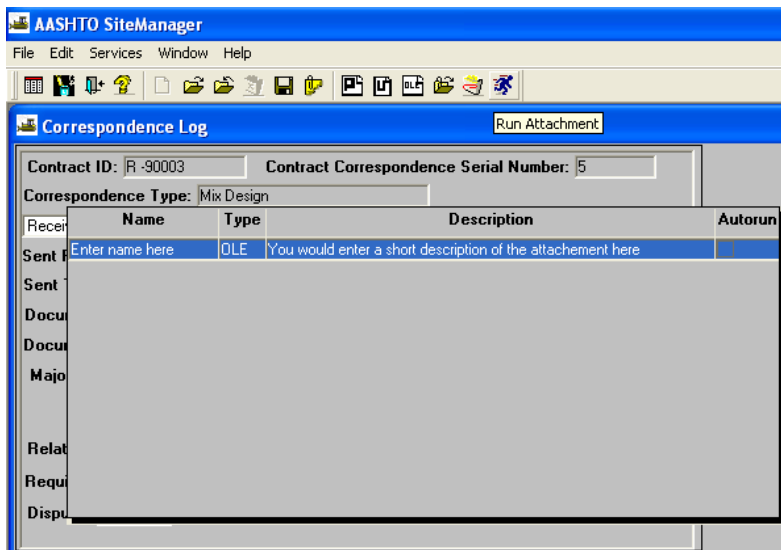
This module will explain how to view attached documents. Any window within SiteManager can have a document attached to it that has the **Attachments**  button located on the toolbar. This module will use the **Correspondence Log** location to view an attachment.



The screenshot shows the AASHTO SiteManager application window. The title bar reads "AASHTO SiteManager". The menu bar includes "File", "Edit", "Services", "Window", and "Help". The toolbar contains various icons, including a folder icon with a document, which is highlighted. The main window is titled "Correspondence Log" and has a tab labeled "Attachments". The form contains the following fields:

- Contract ID: R-90003
- Contract Correspondence Serial Number: 5
- Correspondence Type: Mix Design
- Received: [dropdown] On: 12/11/07
- Correspondence ID: 041401122D
- Sent From: Black Side Up Paving
- Sent To: Greenfield District Testing Lab
- Document Category: Superpave Mix Design [dropdown]
- Document Location: Greenfield
- Major Topics: HMA Mix Design, 401 25.0 mm Base
- Related Correspondence: 3 [dropdown] Other
- Required Response Text: Enter appropriate text here.
- Dispute: 6

“Click” on the **Attachments**  button located on the toolbar.



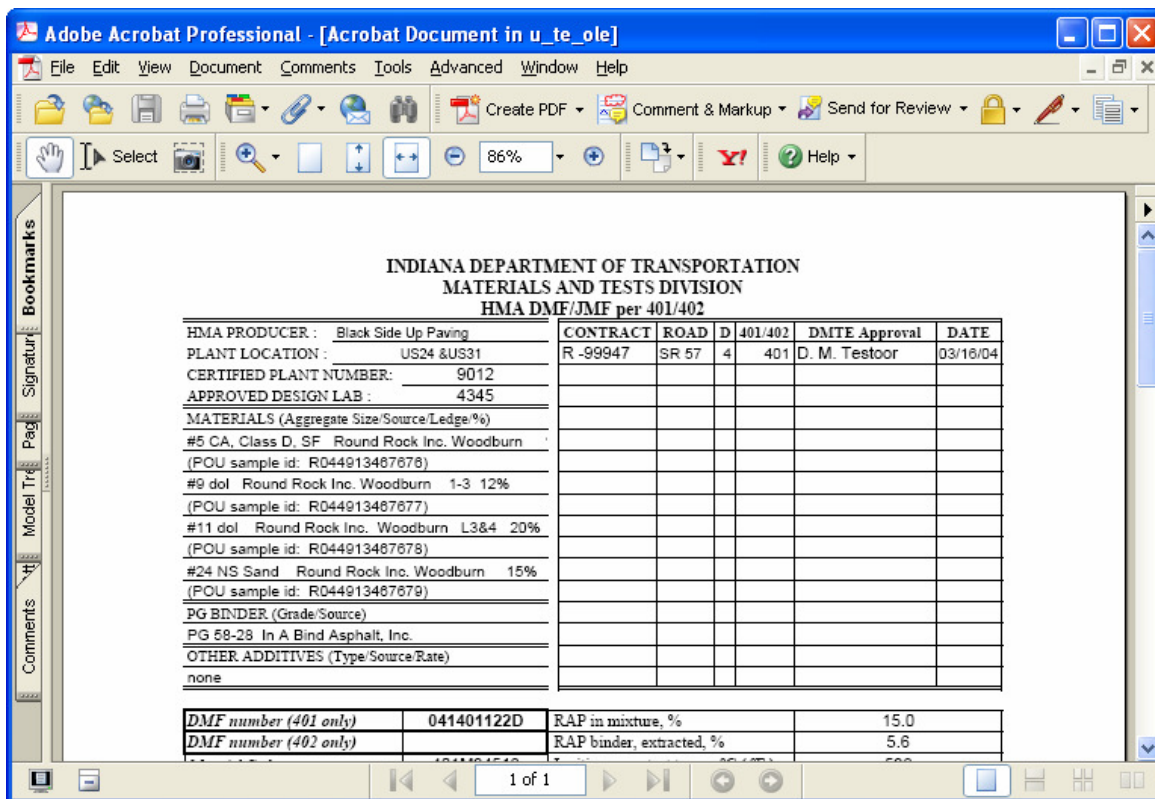
The screenshot shows the AASHTO SiteManager application window. The title bar reads "AASHTO SiteManager". The menu bar includes "File", "Edit", "Services", "Window", and "Help". The toolbar contains various icons, including a folder icon with a document, which is highlighted. The main window is titled "Correspondence Log" and has a tab labeled "Run Attachment". The form contains the following fields:

- Contract ID: R-90003
- Contract Correspondence Serial Number: 5
- Correspondence Type: Mix Design
- Received: [dropdown] On: 12/11/07
- Correspondence ID: 041401122D
- Sent From: Black Side Up Paving
- Sent To: Greenfield District Testing Lab
- Document Category: Superpave Mix Design [dropdown]
- Document Location: Greenfield
- Major Topics: HMA Mix Design, 401 25.0 mm Base
- Related Correspondence: 3 [dropdown] Other
- Required Response Text: Enter appropriate text here.
- Dispute: 6

Name	Type	Description	Autorun
Enter name here	DLE	You would enter a short description of the attachment here	<input type="checkbox"/>

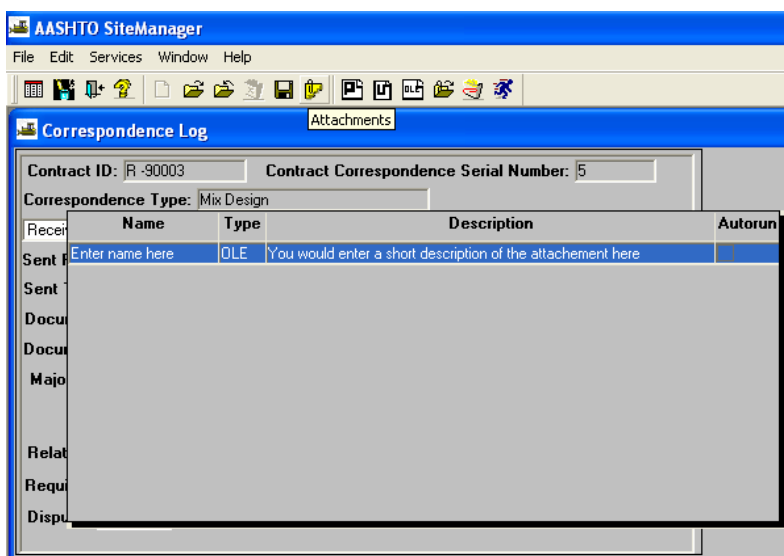
“Click” on the appropriate **Name**.

“Click” on the **Run Attachment**  button located on the toolbar.



The attachment opens. After viewing the document, close the document.

NOTE: Either exit the document by using the File option on the menu bar, or be CAREFUL if selecting the "X" in the upper right corner to select the correct one.



“Click” on the **Attachments**  button to close the Attachments window.

AASHTO SiteManager

File Edit Services Window Help

Correspondence Log Close

Contract ID: R-90003 Contract Correspondence Serial Number: 5

Correspondence Type: Mix Design

Received On: 12/11/07 Correspondence ID: 041401122D

Sent From: Black Side Up Paving

Sent To: Greenfield District Testing Lab

Document Category: Superpave Mix Design


Document Location: Greenfield

Major Topics: HMA Mix Design
401 25.0 mm Base

Related Correspondence: 3 Other

Required Response Text: Enter appropriate text here.

Dispute: 6

“Click” on the **Close**  button located on the toolbar to exit the **Correspondence Log** window.